COBRA & Direct Billing  
QB Import Specification

Revision 2034

February 11, 2023

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**Introduction**

The Qualified Beneficiary (QB) Import system was designed to allow for easy importation of QB information into the COBRA & Direct Billing system. The system utilizes a Comma Separated Values (CSV) import text file to input information about a QB. This document is designed to explain the format and function of this import file.

**Scope**

This document will explain the format and function of the import file used to import QBs into the COBRA & Direct Billing system. It is not written to fully explain the QB fields or define imports other than the QB import. This document defines import version 1.2.

**Revision History**

Revision 1.9, 9/25/2009 – Changed [QB] PremiumCouponType value from MONTHLYPREMIUMNOTICE to PREMIUMNOTICE to be consistent with production UI.

Revision 2002 (changed revision numbering) – changed wording of Leave Blank if PremiumAddressSameAsPrimary = False. Required if PremiumAddressSameAsPrimary = True To Leave Blank if PremiumAddressSameAsPrimary = True. Required if PremiumAddressSameAsPrimary = False

Revision 2003 – Added SendDODSubsidyExtension to QBLEGACY line. Set to true to have the COBRA & Direct Billing system send the ARRA DOD Subsidy Extension letter at time of import

Revision 2004 – Made AEI2009SubsidyEligibleAttestationPostMarkDate a required field if the AEISubsidyStartDate is filled in

Revision 2005 – Member Specific Rates can have up to 4 digits after the decimal place, changed the data type from Money to Decimal for [QBPLANMEMBERSPECIFICRATE] and [QBPLANMEMBERSPECIFICRATEINITIAL] rates

Revision 2006 – Added 2nd Event AEI Subsidy Eligible Fields to [QBEVENT]

Revision 2007 – Made EndDate required on [QBSUBSIDYSCHEDULE] to be consistent with COBRA & Direct Billing UI

Revision 2008 – Deprecated SendDODSubsidyExtension field on QBLEGACY

Revision 2009 – QBPLANINITIAL and QBDEPENDENTPLANINITIAL updated to reflect interaction with QBLEGACY

Revision 2010 – Updated verbiage around QBPLAN and QBPLANINITIAL

Revision 2011 – Added more values to QBEVENT EventType

Revision 2012 – Revised Revision 2011 and added missing text (QBEVENT EventType )

Revision 2013 – Added [Deprecated – do not use] to QB Premium address fields

Revision 2014 – Added BenefitGroup, AccountStructure, and ClientCustomData columns to [QB]

Revision 2015 – Removed FMLA from Employee Type to be consistent with UI

Revision 2016 – Added AllowMemberSSO column

Revision 2017 – Added Double Quote escape character of backslash (\) (See Text in Section 9 for details)

Revision 2018 – Allow zero for [QBPLAN] grace periods

Revision 2019 – Increased length of IndividualID from 20 to 50

Revision 2020 – Added Qualifying Event Type of RETIREEBANKRUPTCY

Revision 2021 – AEI fields/LineTypes are depricated

Revision 2022 – Revised document branding and formatting

Revision 2023 – Updated the SSO ID field to be SSO Identifier

Revision 2024 – Updated “[VERSION], 1.1” to “[VERSION] 1.2” in Import Version and Sample Import File sections. Also removed “(see Import File Process for more information)” from the [VERSION] section as the section it references doesn’t give any detail on version #.

Revision 2025 – Removed the requirement for “IsQMCSO” in the [QBDEPENDENT] line identifier

Revision 2026 – Added Plan Category to the member record

Revision 2027 – Added line [QBLETTERATTACHMENT]. Revised document branding.

Revision 2028 – Added description of “TRUE or FALSE” to AllowMemberSSO

Revision 2029 - Updated PlanCategory Data Type & Accepted Values in [QB] line identifier

Revision 2030 – Added QBSTATEINSERTS table with the list of accepted values.

Revision 2031 – Updated Sex field with newly added Undisclosed sex value.

Revision 2032 – Added [QBLOOKUP], [MEMBERUSERDEFINEDFIELD] line identifiers.

Revision 2033 - Updated [QBSUBSIDYSCHEDULE].

Revision 2034 - Updated Data Type values from “Decimal” to “Money” for Rate Amount fields.

**Definition of Terms**

This document uses various terms that may have different meanings to different audiences. This section will help to explain these terms in the context of this document.

**Qualified Beneficiary (QB)**

A QB is an individual that is eligible for COBRA benefits and needs to be entered into the system. A QB has a variety of information that must be entered when the QB is entered as well as a variety of optional information that may be entered with the QB.

**CSV – Comma Separated Values file**

A CSV file is a text file that contains values on each row that are separated by commas.

**Note:**  You should not use Excel to edit or save these files as Excel will alter the format of large numeric columns (such as SSN) and make them unreadable to the system.

**Import Version**

Each import file should include a [VERSION] section that identifies the import version format the import file is adhering to.

If a [VERSION] record does not exist in the import file, an error will be generated.

The current version line should be: [VERSION],1.2

**Line Identifier**

Each text line that is imported must have a line identifier as its first field, see Import File Process for more information. This line identifier defines which fields come next on the text line.

**Import File Process**

A CSV import file should be created that matches the specifications defined in this document.

**Note:**  You should not use Excel to edit or save these files as Excel will alter the format of large numeric columns (such as SSN) and make them unreadable to the system.

The import file may be built with a simple text editor (such as Notepad) or generated from an export program written for an existing database.

To begin the import process:

* Navigate to **Utilities > Administrator Utilities > Import** from the COBRA & Direct Billing Main Menu Bar within the TPA, Employer, or Employer Division Portal.
* A page will be displayed allowing you to select a file. Browse to and locate your CSV import file on any of your local or network drives.
* Click the **Import File** button.
* The Import process will start by uploading your CSV file to the system. After the upload is complete, the system will begin scanning and importing the data contained in the import file.



* After the file has been imported, a report will be displayed indicating the success or failure of the import file data. If an error occurs, it will be indicated using its line number along with a description of the error. The Import Totals section describes the total number of lines processed and the total number of errors encountered.

**Import File Layout**

The Import file is a CSV file where each line has values separated by commas. To allow for the importation of different types of information, the first field of each line defines what type of information will follow for the fields of that line. For instance, to begin the importation of a QB record you will need a QB line that starts with a line identifier of “[QB]” and may appear similar to the following:

[QB], My Client Name, My Client Division Name, MR, Bob, L, Jones, 555555555, (etc.)

This QB will then also need a line that defines the qualifying event information for the QB. This is accomplished with a line that begins with a line identifier of “[QBEVENT]” and the file might now appear something like this:

[QB], My Client Name, My Client Division Name, MR, Bob, L, Jones, 555555555, (etc.)

[QBEVENT], TERMINATION, 5/1/2008, 1/1/1999, , , (etc.)

All of the lines that follow the “[QB]” line are related to that QB. When a new “[QB]” line is encountered, the previous QB is validated and saved to the database and then the import process begins for the new QB.

Line identifiers and their definitions are as follows:

|  |  |  |
| --- | --- | --- |
| Line Identifier | Required | Description |
| [QB] | x | The main QB record |
| [QBEVENT] | x | The QB’s qualifying event information |
| [QBLEGACY] |  | The QB’s legacy information. This is an option line and is only needed if the QB is a Legacy QB. |
| [QBPLAN] | x | Defines a single client plan that the QB is eligible for under COBRA. There must be at least one of these lines in the import file for each QB, but there may be several for each QB if the QB is eligible for more than one plan. |
| [QBDEPENDENT] |  | Defines a single dependent that is also eligible for COBRA under the QB. This is an option line, but there may be several of these lines for a QB if there are multiple dependents under this QB. |
| [QBDEPENDENTPLAN] |  | Defines a single QB Plan that a dependent is enrolled on for this QB. These records must be under the appropriate [QBDEPENDENT] record and there may be multiple of these for a single dependent. |
| [QBNOTE] |  | An option line that defines a note for a QB. There may be multiple of these for a single QB. |
| [QBSUBSIDYSCHEDULE] |  | Defines a single record of a subsidy schedule for a QB. These are optional and there may be several of these lines to define a schedule for multiple insurance types. |
| [QBSTATEINSERTS] |  | These are optional lines that may be added to describe the letter inserts that attached to a Specific Rights Letter. There may be several of these defined for a single QB if needed. |
| [QBDISABILITYEXTENSION] |  | If the QB is on a Disability Extension this optional line is used to define the parameters of this extension. |
| [QBPLANMEMBERSPECIFICRATE] |  | If a QB is under a plan that has a rate type of “Member Specific Rates”, then these lines are used to describe the rate to be used for this QB. These records should be immediately after the [QBPLAN} record that they refer to. |
| [QBPLANTERMREINSTATE] |  | If a QB has been terminated and/or reinstated on a Client plan, then this line will define the parameters of that termination or reinstatement. These records should be immediately after the [QBPLAN] record that they refer to. |
| [QBLETTERATTACHMENT] |  | This is an optional line that may be added to describe the letter attachments you want to send to a particular member. |
| [QBLOOKUP] |  | The line is used to find the required QB record. |
| [MEMBERUSERDEFINEDFIELD] |  | The line is used to enter User Defined Field Values for QB. |

**Import Version Label**

Each import file should include a [VERSION] section that identifies what import version format the import file is adhering to. If no [VERSION] record exists in the import file, it is assumed that the import file is adhering to   
Version 1. As new capabilities or changes are made to the import file format this document and the equivalent version number will be updated.

This revision of this document defines version 1.2 of the import.

**Import Line Identifiers (Section Definitions)**

The line identifiers explained in the Import Version Label section each expect various fields to follow them on their respective line. The tables below define these fields for each of the line identifiers.

Required fields need to have a value after the comma that corresponds to the data type specified. Non-required fields may be left blank (nothing appearing between the commas).

**[VERSION]**

|  |  |  |  |
| --- | --- | --- | --- |
| Column Name | Data Type | Required | Accepted Values |
| VersionNumber | Integer | x | Use “1.2” for this import specification |

**[QB]**

|  |  |  |  |
| --- | --- | --- | --- |
| Column Name | Data Type | Required | Accepted Values |
| ClientName | Text - 100 | x | The unique Client name assigned in COBRA & Direct Billing |
| ClientDivisionName | Text - 50 | x | The unique Client Division name assigned in COBRA & Direct Billing. If there are no Divisions, then use the ClientName. |
| Salutation | Text - 35 |  | MR, MRS, MS, MISS, DR |
| FirstName | Text - 50 | x |  |
| MiddleInitial | Text - 1 |  |  |
| LastName | Text - 50 | x |  |
| SSN | SSN | x | Social Security Number |
| IndividualID | Text - 50 |  | Optional, used to store Employee ID #s or any other type of secondary identification |
| Email | Email |  |  |
| Phone | Phone |  |  |
| Phone2 | Phone |  |  |
| Address1 | Text - 50 | x |  |
| Address2 | Text - 50 |  |  |
| City | Text - 50 | x |  |
| StateOrProvince | Text - 50 | x |  |
| PostalCode | Text - 35 | x |  |
| Country | Text - 50 |  | Leave blank if the QB resides in the USA |
| PremiumAddressSameAsPrimary | Boolean | x | Always set to TRUE |
| PremiumAddress1 | Text - 50 |  | [Deprecated – do not use] |
| PremiumAddress2 | Text - 50 |  | [Deprecated – do not use] |
| PremiumCity | Text - 50 |  | [Deprecated – do not use] |
| PremiumStateOrProvince | Text - 50 |  | [Deprecated – do not use] |
| PremiumPostalCode | Text - 35 |  | [Deprecated – do not use] |
| PremiumCountry | Text - 50 |  | [Deprecated – do not use] |
| Sex | Sex | x | F, M, U |
| DOB | Date | x | Date of Birth – needed for age based plans and also for the Medicare Letter |
| TobaccoUse | Text - 35 | x | YES, NO, UNKNOWN |
| EmployeeType | Text - 35 | x | FTE, PTE, H1B, CONSULTANT, SABBATICAL, PROBATIONARY, CONTINGENT, TELECOMMUTING, INTERN, GROUPLEADER, ASSOCIATE, PARTNER, UNKNOWN |
| EmployeePayrollType | Text - 35 | x | EXEMPT, NONEXEMPT, UNKNOWN |
| YearsOfService | Integer |  | Not used currently and only informational |
| PremiumCouponType | Text - 35 | x | PREMIUMNOTICE, COUPONBOOK, NONE |
| UsesHCTC | Boolean | x | TRUE if this QB uses the Health Care Tax Credit (HCTC) system |
| Active | Boolean | x | Should always be set to TRUE |
| AllowMemberSSO | Boolean | x | TRUE or FALSE |
| BenefitGroup | Text - 50 |  |  |
| AccountStructure | Text - 50 |  |  |
| ClientSpecificData | Text - 50 |  |  |
| SSOIdentifier | Text - 50 |  |  |
| PlanCategory | Text |  | Separate multiple entries with a comma (each individual entry cannot exceed 100 characters). Angle Brackets “< >” are not permitted. |

**[QBEVENT]**

EventType determines the Category of Event, either Employee or Dependent. Dependent EventTypes are: DIVORCELEGALSEPARATION, DEATH, INELIGIBLEDEPENDENT and MEDICARE. All other EventTypes are Employee.

|  |  |  |  |
| --- | --- | --- | --- |
| Column Name | Data Type | Required | Accepted Values |
| EventType | Text – 35 | x | DIVORCELEGASSEPARATION  DEATH  INELIGIBLEDEPENDENT  MEDICARE  TERMINATION  RETIREMENT  REDUCTIONINHOURS-STATUSCHANGE  REDUCTIONINFORCE  BANKRUPTCY  STATECONTINUATION  LOSSOFELIGIBILITY  REDUCTIONINHOURS-ENDOFLEAVE  WORKSTOPPAGE  USERRA-TERMINATION  USERRA-REDUCTIONINHOURS  INVOLUNTARYTERMINATION  TERMINATIONWITHSEVERANCE  RETIREEBANKRUPTCY |
| EventDate | Date |  | The qualifying event date that the event type occurred on. Do not adjust for plan benefit termination types, just use the actual date of the event. |
| EnrollmentDate | Date | x | Original enrollment date of the member’s current medical plan - used for HIPAA certificate to show length of continuous coverage |
| EmployeeSSN | SSN | x | The original employee’s SSN. Required if the event type is a dependent type event, such as DEATH, DIVORCELEGALSEPARATION, INELIGIBLEDEPENDENT or MEDICARE. |
| EmployeeName | Text – 100 | x | The original employee’s name. Required if the event type is a dependent type event, such as DEATH, DIVORCELEGALSEPARATION, INELIGIBLEDEPENDENT or MEDICARE. |
| SecondEventOriginalFDOC | Date | x | DEPRECATED – any value will be ignored |

**[QBLEGACY]**

If applicable

|  |  |  |  |
| --- | --- | --- | --- |
| Column Name | Data Type | Required | Accepted Values |
| DateSpecificRightsNoticeWasPrinted | Date | x | The date that the original Specific Rights Notice was printed (or postmarked) |
| PostmarkDateOfElection | Date |  | If the QB has elected, then the date of that election (or the postmark of the election form receipt) should be entered as the postmark date of election form |
| IsPaidThroughLastDayOfCOBRA | Boolean | x | If the QB is paid all the way through the end of COBRA then set this to TRUE, otherwise FALSE |
| NextPremiumOwedMonth | Integer | x | The month (1-12) of the next payment that is owed |
| NextPremiumOwedYear | Integer | x | The year (for example 2009) of the next payment that is owed |
| NextPremiumOwedAmountReceived | Money | x | Always set to 0 |
| SendTakeoverLetter | Boolean | x | Set to TRUE if a Takeover Letter is to be sent to this legacy QB. Takeover Letters are typically sent out when a QB is switching from one TPA to another. |
| IsConversionLetterSent | Boolean | x | Set to TRUE if this Legacy QB has already received a Conversion Letter. Conversion Letters are sent out 180 days before the end of COBRA explaining the QB’s right to convert their coverage. |
| SendDODSubsidyExtension | Boolean | x | Deprecated – any value will be ignored, set to FALSE. |

**QB Plan Line Types**

There are two types of Plan lines available for QB imports: [QBPLANINITIAL] and [QBPLAN]. The intent of [QBPLANINITIAL] is to provide a simple way to import QB Plan data making some initial assumptions. These assumptions are that the StartDate will be calculated based on First Day of COBRA (FDOC) and the QB will be on this plan through their Last Day of COBRA (LDOC). [QBPLAN] is used when you need to specify the StartDate or EndDate, have multiple plans spanning rate periods, use bundles, the QB is a legacy, and any other scenario where you need to provide more detail during the import.

**[QBPLANINITIAL]**

The [QBPLANINITIAL] record type enters a QB initially on a plan with a coverage level. It assumes that the QB is on the plan from First Day of COBRA (FDOC) through Last Day of COBRA (LDOC). QBPLANINITIAL is not intended for use with Legacy QBs ([QBLEGACY] lines), for Legacy QBs please use the QBPLAN line instead.

Example [QBPLANINITIAL] line:

[QBPLANINITIAL],Medical Plan,EE+FAMILY,,

|  |  |  |  |
| --- | --- | --- | --- |
| Column Name | Data Type | Required | Accepted Values |
| PlanName | Text – 50 | x | The unique Client plan name |
| CoverageLevel | Text – 35 | x | EE, EE+SPOUSE, EE+CHILD, EE+CHILDREN, EE+FAMILY, EE+1, EE+2, SPOUSEONLY, SPOUSE+CHILD, CHILDREN,  EE+1Child, EE+2Children, EE+3Children, EE+4Children, EE+5orMoreChildren, EE+Spouse+1Child, EE+Spouse+2Children, EE+Spouse+3Children, EE+Spouse+4Children, EE+Spouse+5orMoreChildren, SPOUSE+1CHILD, SPOUSE+2CHILDREN, SPOUSE+3CHILDREN,  SPOUSE+4CHILDREN, SPOUSE+5ORMORECHILDREN, EE+DOMESTICPARTNER, EE1UNDER19, EE+SPOUSE1UNDER19, EE+SPOUSE2UNDER19, EE+CHILDREN1UNDER19, EE+CHILDREN2UNDER19, EE+CHILDREN3UNDER19, EE+FAMILY1UNDER19, EE+FAMILY2UNDER19, EE+FAMILY3UNDER19 |
| NumberOfUnit | Decimal |  | Sets the # of units for this plan. Required if plan is units based (e.g. Life). |

**[QBPLAN]**

The [QBPLAN] record is for more advanced input of QB plans for things like open enrollment, Legacy QBs, and special state continuation situations. Normal QB plan records should instead be entered with the [QBPLANINITIAL] record.

Example [QBPLAN] line:

[QBPLAN],Medical Plan,12/1/2011,,EE+FAMILY,,,,,,,,,,,,

|  |  |  |  |
| --- | --- | --- | --- |
| Column Name | Data Type | Required | Accepted Values |
| PlanName | Text – 50 | x | The unique Client plan name |
| StartDate | Date | x | The start date that the QB will begin coverage on this plan. This should be set to the FDOC for the plan in the field above. |
| EndDate | Date |  | Optional, the end date the QB will cease coverage on this plan. This should be set to the LDOC for the plan in the field above. |
| CoverageLevel | Text – 35 | x | EE, EE+SPOUSE, EE+CHILD, EE+CHILDREN, EE+FAMILY, EE+1, EE+2, SPOUSEONLY, SPOUSE+CHILD, CHILDREN,  EE+1Child, EE+2Children, EE+3Children, EE+4Children, EE+5orMoreChildren, EE+Spouse+1Child, EE+Spouse+2Children, EE+Spouse+3Children, EE+Spouse+4Children, EE+Spouse+5orMoreChildren, SPOUSE+1CHILD, SPOUSE+2CHILDREN, SPOUSE+3CHILDREN,  SPOUSE+4CHILDREN, SPOUSE+5ORMORECHILDREN |
| FirstDayOfCOBRA | Date |  | The First Day of COBRA. Unless you wish to override the calculated FDOC, this field should be left blank. If left blank the system will determine the FDOC based on the EventDate and the plan benefit termination type. |
| LastDayOfCOBRA | Date |  | The Last Day of COBRA. This field should be left blank. The system will determine the LDOC based on the FDOC and COBRADurationMonths. |
| COBRADurationMonths | Integer |  | The number of months of COBRA is usually determined by the event type. This may be left blank (preferred) and the system will determine the correct number of months. It is typically 18 months, but can be extended on Dependent Event Types and USERRA Event Types. |
| DaysToElect | Integer |  | The number of days the QB has to elect coverage under COBRA. This may be left blank (preferred) and the system will determine the correct number of days. It is typically 60 days. |
| DaysToMake1stPayment | Integer |  | The number of days the QB has to make their 1st full payment under COBRA. This may be left blank (preferred) and the system will determine the correct number of days. It is typically 45 days. |
| DaysToMakeSubsequentPayments | Integer |  | The total number of days the member has to make subsequent payments after their initial payment. This may be left blank (preferred) and the system will determine the correct number of days. It is typically 45 days. |
| ElectionPostmarkDate | Date |  | Always leave blank |
| LastDateRatesNotified | Date |  | Always leave blank |
| NumberOfUnits | Decimal |  | Sets the # of units for this plan. Required if plan is units based (e.g. Life). |
| SendPlanChangeLetterForLegacy | Boolean | x | Set to TRUE to send a plan change letter after this record is entered. |
| PlanBundleName | Text – 50 |  | Conditionally required for plans that are part of a bundle. |

**[QBDEPENDENT]**

If applicable

|  |  |  |  |
| --- | --- | --- | --- |
| Column Name | Data Type | Required | Accepted Values |
| SSN | SSN |  | Social Security Number |
| Relationship | Text – 35 | x | SPOUSE, CHILD, DOMESTICPARTNER |
| Salutation | Text – 35 |  | MR, MRS, MS, MISS, DR |
| FirstName | Text – 50 | x |  |
| MiddleInitial | Text – 1 |  |  |
| LastName | Text – 50 | x |  |
| Email | Email |  |  |
| Phone | Phone |  |  |
| Phone2 | Phone |  |  |
| AddressSameAsQB | Boolean | x | Set to TRUE if the dependent’s address is the same as the QB’s address |
| Address1 | Text – 50 |  |  |
| Address2 | Text – 50 |  |  |
| City | Text – 50 |  |  |
| StateOrProvince | Text – 50 |  |  |
| PostalCode | Text – 35 |  |  |
| Country | Text – 50 |  | Leave empty if the dependent resides in the USA |
| EnrollmentDate | Date |  | Original enrollment date of the dependent’s medical plan - used for HIPAA certificate |
| Sex | Sex |  | F, M, U (this is required if the dependent is on a sex based plan that sets rates based on the dependent’s sex) |
| DOB | Date |  | Date of birth (this is required if the dependent is on an age based plan that sets rates based on the dependent’s age) |
| IsQMCSO | Boolean |  | TRUE if the dependent is under a Qualified Medical Child Support Order (QMCSO) |

**[QBDEPENDENTPLANINITIAL]**

The [QBDEPENDENTPLANINITIAL] record type enters a QB dependent initially on a plan. It assumes that the dependent is on the plan from First Day of COBRA (FDOC) through Last Day of COBRA (LDOC).

QBDEPENDENTPLANINITIAL is not intended for use with Legacy QBs ([QBLEGACY] lines), for Legacy QBs please use the QBDEPENDENTPLAN line instead.

|  |  |  |  |
| --- | --- | --- | --- |
| Column Name | Data Type | Required | Accepted Values |
| PlanName | Test – 50 | x | The unique Client plan name |

**[QBDEPENDENTPLAN]**

If applicable

The [QBDEPENDENTPLAN] record is for more advanced input of QB dependent plan information such as a dependent going on or off a plan over time. For the initial load of a QB dependent plan where the dependent will be on the plan for the entire coverage period use the [QBDEPENDENTPLANINITIAL] record type instead.

|  |  |  |  |
| --- | --- | --- | --- |
| Column Name | Data Type | Required | Accepted Values |
| PlanName | Test – 50 | x | The unique Client plan name |
| StartDate | Date | x | The start date of the dependent on the plan. This should be set to the FDOC for the plan in the field above. |
| EndDate | Date |  | The end date of the dependent on the plan. This should be set to the LDOC for the plan in the field above unless it is known that the dependent will be ending the plan before LDOC. |
| UsesFDOC | Boolean |  | Set to TRUE if the dependent’s plan starts on the QB’s FDOC. Default value is TRUE. |

**[QBNOTE]**

If applicable

|  |  |  |  |
| --- | --- | --- | --- |
| Column Name | Data Type | Required | Accepted Values |
| NoteType | Text – 35 | x | MANUAL, AUTONOTE |
| DateTime | DateTime | x | Date and time of the note |
| NoteText | Text - 2000 | x |  |
| UserName | UserName |  | Always leave blank |

**[QBSUBSIDYSCHEDULE]**

If applicable

|  |  |  |  |
| --- | --- | --- | --- |
| Column Name | Data Type | Required | Accepted Values |
| InsuranceType | Text – 35 | x | MEDICAL, DENTAL, VISION, PHARMACY, FSA, HCRA, EAP, GAP, 401k, LIFE, NULIFE, MSA, PBA, HSA, NUOTHER1, NUOTHER2, GRPLIFE, NUGRPLIFE, VOLLIFE, NUVOLLIFE, CANCER, MERP, DEPLIFE1, DEPLIFE2, DEPLIFE3, NUDEPLIFE1, NUDEPLIFE2, NUDEPLIFE3, MEDSTURIDER1, MEDSTURIDER2, MEDSTURIDER3, LTD, AD&D, CHIROPRACTIC, VEBA, CUSTOMBILLING, LTDNONUNITBASED, LTDUNITBASED, STDNONUNITBASED, STDUNITBASED, CRITICALILLNESS, ACCIDENTNONUNITBASED, ACCIDENTUNITBASED, VOLUNTARYOTHER, UOTHER1, UOTHER2, UOTHER3 |
| SubsidyAmountType | Text – 35 | ? | FLAT or PERCENTAGE is required if RatePeriodSubsidy is False |
| StartDate | Date | x | Start date of the subsidy |
| EndDate | Date | x | End date of the subsidy |
| Amount | Money | ? | Required if RatePeriodSubsidy is False.  Amount if FLAT or Percentage if PERCENTAGE of the subsidy. For example, use “50” if it is a 50% subsidy and the SubsidyAmountType is set to PERCENTAGE. |
| SubsidyType | Text – 35 |  | EMPLOYER (defaults to EMPLOYER) |
| RatePeriodSubsidy | Boolean | ? | True = "1", "Y", "YES", "T" or "TRUE";  False="0", "N", "NO", "F" or "FALSE";  Blank value. If RatePeriodSubsidy=blank, True or False value will be applied after import by the system according to the existing logic.  RatePeriodSubsidy is not allowed to import on Employer Portal. True or False value will be applied after import by the system according to the existing logic. |

**[QBSTATEINSERTS]**

|  |  |  |  |
| --- | --- | --- | --- |
| Column Name | Data Type | Required | Description |
| CASRINSERT | Boolean |  | California Specific Rights Letter Insert. Default is FALSE. |
| CTSRINSERT | Boolean |  | Connecticut Specific Rights Letter Insert. Default is FALSE. |
| MNLIFEINSERT | Boolean |  | Minnesota Life Specific Rights Letter Insert. Default is FALSE. |
| MNCONTINSERT | Boolean |  | Minnesota Continuation Specific Rights Insert. Default is FALSE. |
| ORSRINSERT | Boolean |  | Oregon Specific Rights Letter Insert. Default is FALSE. |
| TXSRINSERT | Boolean |  | Texas Specific Rights Letter Insert. Default is FALSE. |
| NY-SR INSERT | Boolean |  | New York State Continuation. Default is FALSE. |
| VEBASRINSERT | Boolean |  | VEBA Specific Rights Letter Insert. Default is FALSE. |
| ILSRINSERT | Boolean |  | Illinois State Continuation. Default is FALSE. |
| RISRINSERT | Boolean |  | Rhode Island State Continuation. Default is FALSE. |
| GASRINSERT | Boolean |  | Georgia State Continuation. Default is FALSE. Default is FALSE. |
| VASRINSERT | Boolean |  | Commonwealth of VA Continuation. Default is FALSE. |

**[QBDISABILITYEXTENSION]**

If applicable

|  |  |  |  |
| --- | --- | --- | --- |
| Column Name | Data Type | Required | Accepted Values |
| DisabilityApproved | Boolean | x | Set to TRUE if the Disability Extension is approved or FALSE if it is not |
| PostmarkOfDisabilityExtension | Date | x | Set to the postmark date that the Disability Extension when it was received |
| DateDisabled | Date | x | The date the member was disabled |
| DenialReason | Text -35 |  | DISABILITYDATE, SUBMISSIONDATE – required if DisabilityApproved is FALSE |

**[QBPLANMEMBERSPECIFICRATEINITIAL]**

If applicable

The [QBPLANMEMBERSPECIFICRATEINITIAL] record type is used to enter a member specific rate for a plan. It assumes that the rate will be applied from First Day of COBRA (FDOC) through Last Day of COBRA (LDOC).

[QBPLANMEMBERSPECIFICRATEINITIAL] must only be used with a corresponding [QBPLANINITIAL] – it does not work with [QBPLAN].

|  |  |  |  |
| --- | --- | --- | --- |
| Column Name | Data Type | Required | Accepted Values |
| PlanName | Text – 50 | x | The unique Client plan name |
| Rate | Money | x | The amount of the member specific rate |

**[QBPLANMEMBERSPECIFICRATE]**

If applicable

The [QBPLANMEMBERSPECIFICRATE] record is for advanced input of member specific rates that change over time. For the initial load of a member specific rate that does not change, use the [QBPLANMEMBERSPECIFICRATEINITIAL] record type instead as it will automatically adjust the start date and end date for the entire coverage period. However, if you use [QBPLANMEMBERSPECIFICRATEINITIAL] you must use [QBPLANINITIAL] instead of [QBPLAN] for any QB plan records.

|  |  |  |  |
| --- | --- | --- | --- |
| Column Name | Data Type | Required | Accepted Values |
| PlanName | Text – 50 | x | The unique Client plan name |
| StartDate | Date | x | The start date of the dependent on the plan. This should be set to the FDOC for the plan in the field above. |
| EndDate | Date | x | End date of the member specific rate |
| Rate | Money | x | The amount of the member specific rate |

**[QBPLANTERMREINSTATE]**

If applicable

|  |  |  |  |
| --- | --- | --- | --- |
| Column Name | Data Type | Required | Accepted Values |
| PlanName | Text – 50 | x | The unique Client plan name |
| TermOrReinstate | Text – 20 | x | TERMINATE or REINSTATE |
| EffectiveDate | Date | x | Effective date of the term or reinstate |
| Reason | Text - 35 | x | Reason for the termination or reinstatement |

**[QBLETTERATTACHMENT]**

If applicable

|  |  |  |  |
| --- | --- | --- | --- |
| Column Name | Data Type | Required | Accepted Values |
| LetterAttachmentName | Text-100 | x | The unique name of letter attachment. |

**[QBLOOKUP]**

If applicable

|  |  |  |  |
| --- | --- | --- | --- |
| **Column Name** | **Data Type** | **Required** | **Accepted Values** |
| ClientName | Text - 100 | x | N/A |
| SSN | SSN | x | N/A |
| QualifyingEventDate | Date | x | N/A |

**[MEMBERUSERDEFINEDFIELD]**

If applicable

The [MEMBERUSERDEFINEDFIELD] record type is used to enter User Defined Field Values for Members.

[MEMBERUSERDEFINEDFIELD] must only be used with a corresponding [QB] for new QB or [QBLOOKUP] for existing QB.

|  |  |  |  |
| --- | --- | --- | --- |
| **Column Name** | **Data Type** | **Required** | **Accepted Values** |
| UserDefinedFieldName | Text - 35 | x | The unique name of the user defined field. |
| UserDefinedFieldValue | Text - 2000 |  | Any provided value, including blank, will be saved. |
| Text - 200 |  | Any provided value, including blank, will be saved. |
| Boolean |  | True = "1", "Y", "YES", "T" or "TRUE";  False="0", "N", "NO", "F" or "FALSE" or blank. |

**Data Types**

The data types used in the various import sections are defined below.

**Note:**  The fields in the import file are all text fields (since the file is CSV format). The following definitions explain the formatting of the text in the corresponding field.

|  |  |
| --- | --- |
| Data Type | Definition |
| Text | Can be any text value up to the number of characters specified. If the text contains a comma, then the entire field should be enclosed in double quotes (“). If you need a double quote to be represented in the text then the double quote (“) must be escaped with a back slash (\”). To get the text - My “Cool” Company – you would represent it like this – My \”Cool\” Company - this escape character works inside other double quotes as well, for example “My “other” Company” would be represented by “My \”other\” Company”. |
| Integer | Can be any number from 0 to 32,767. No punctuation |
| Date | Entered as MM/DD/YYYY, where MM is the month, DD is the day and YYYY is the year. You can use a single digit or two digit leading zero for the month and day. The year should always be entered as 4 digits. |
| DateTime | Entered as MM/DD/YYYY HH:mm AM, where MM is the month, DD is the day and YYYY is the year, HH is the hour, mm is the minute and AM is either AM or PM. You can use a single digit or two digit leading zero for the month, day, hour and minute. The year should always be entered as 4 digits. |
| Boolean | True = "1", "Y", "YES", "T" or "TRUE", False="0", "N", "NO", "F" or "FALSE". |
| Money | Format as number with one period, no commas and always have at least one digit to the left of the period and 2 digits to the right of the period. IE: 12 cents would be entered 0.12 |
| SSN | Format as 9 digits – can also include the dashes. Note that leading zeros are required if the SSN begins with zeros. |
| Sex | Single character where F = Female, M = Male, U = Undisclosed. |
| Phone | Format as 10 digits. |
| Email | Text – 100, with at least one “@” and at least one “.” after the @. |
| UserName | Text – 50. This field MUST match an existing user in the system, but may be left empty, in which case the UserName of the person doing the Import will be used as the UserName for the record. |
| Decimal | Format as number with one period, no commas and always have at least one digit to the left of the period and up to 4 digits to the right of the period. Example: 0.1234 |

**Sample Import File**

The following text is the contents of a sample file that demonstrates the import of a QB.

[VERSION], 1.2

[QB],Bob's Trucking, Bob's Trucking,MR,Ronald,,McDonnald,655-24-9052,,,7488872482,,1909 Reidsview Dr,,White Lake,MI,48383,,Y,,,,,,,MALE,7/27/1959,UNKNOWN,UNKNOWN,UNKNOWN,0,NONE,N

[QBEVENT],TERMINATION,8/12/2007,2/1/2006,,,2/1/2006

[QBLEGACY],8/29/2007,10/31/2007,N,4,2008,$0.00,N,N

[QBPLAN],Z3,9/1/2007,,EE+FAMILY,9/1/2007,3/1/2009,18,60,45,30,,,0,N

[QBPLAN],Human Indurance Corp Traditional Dental,9/1/2007,,EE+FAMILY,9/1/2007,3/1/2009,18,60,45,30,10/31/2007,,0,N

[QBPLAN],Professional Insurance Plan C,9/1/2007,,EE+FAMILY,9/1/2007,3/1/2009,18,60,45,30,10/31/2007,,0,N

[QBDEPENDENT],085-48-1854,SPOUSE,MRS,Deborah,,McDonnald,,,,N,1909 Reidsview Dr,,White Lake,MI,48383,,2/1/2006,F,7/24/1964,N

[QBDEPENDENTPLAN],Z3,8/12/2007,,N